

SB 329 Ryan Zinke

Generally revise K-12 laws

Chapter: 418      Effective date: various

SB 329 contained the following changes to school funding laws:

*K-12 BASE AID*

- Increases the basic and per-ANB entitlements by 1% in FY 2012 and by 1.6% in FY 2013. The basic and per-ANB entitlements are set as follows:

Entitlement	FY 2011	FY 2012	FY 2013
Elementary Basic	\$ 23,257	\$ 23,033	\$ 23,402
Middle School Basic	\$ 65,863	\$ 65,231	\$ 66,275
High School Basic	\$258,487	\$256,003	\$260,099
Elementary Per-ANB	\$ 5,003	\$ 4,955	\$ 5,034
High school Per-ANB	\$ 6,405	\$ 6,343	\$ 6,444

*School Facility Reimbursements*

- Provides the school facility reimbursements under 20-9-371, MCA, are paid from the state's School Facility and Technology Account. Payments were previously made from the state general fund. The change does not affect the amount or distributions of money to eligible school districts.

*School District Block Grants*

- Eliminates the annual 0.76 % inflator for school district block grants provided in 20-9-630, MCA.

*School District Budgets*

- Limits the amount of unreserved fund balance that a district may reappropriate to fund the general fund budget to 15% of the maximum general fund budget, effective for school budgets for FY 2012 and after. In FY 2012, districts must remit the excess fund balance to the state general fund. Beginning in FY 2013, the excess funds must be remitted to the state where 70% goes to the state guarantee account provided in 20-9-622, 5% goes to the newly established state school oil and natural gas impact account, and 25% goes to the counties for deposit in a newly established county oil and natural gas impact fund in each affected county. (This provision terminates on June 30, 2016.)
- Limits the amount of oil and natural gas production taxes that a school district may receive to 130% of the district's maximum general fund budget. In FY 2012, the Department of Revenue will pay districts up to the limitation and deposit any amount in excess of the limitation to the state general fund. Beginning in FY

2013, the excess will be split among the state guarantee account (70%), the county school oil and natural gas impact fund (25%), and the state school oil and natural gas impact account. (This provision terminates on June 30, 2016.)

- Requires a school district receiving oil and natural gas production taxes to budget in the district general fund a minimum percentage of the total oil and natural gas production taxes received by the district in all funds in the prior year. The required minimum receipts to be budgeted are 25% for FY 2012, 35% for FY 2013, and 45% for FY 2014. For FY 2015 and subsequent years, districts must budget 55% of the prior year oil and natural gas production tax receipts. During the year, the oil and natural gas production taxes received by the district must be deposited in the general fund until the budgeted amount is reached. The school district may deposit any additional oil and natural gas production tax revenues it receives in any budgeted fund of the district. (This provision terminates on June 30, 2016.)
- Requires a school district to report to the education and local government interim committee of the legislature if the district adopts a budget amendment that in combination with any other budget amendments exceeds 10% of the district's adopted general fund budget. The report must include an explanation of why the budget amendment is necessary.
- Allows the school district trustees to impose an over-BASE levy without voter approval if the levy amount does not exceed the over-BASE levy amount authorized by the voters in any of the previous five years.

#### *Fund Transfers*

- Allows a school district to make a one-time transfer of general fund money in excess of 15% of the FY 2011 general fund budget that is not needed to fund the general fund to any budgeted fund of the district. The transfer must be made by June 30, 2011.
- Repeals a provision under 20-9-201(3) that previously required trustees to deposit the balance of a discontinued tuition fund into the miscellaneous programs fund. When closing a tuition fund, the balance may be transferred to any fund the trustees consider appropriate.
- Trustees may hold an election to transfer tax money from one budgeted fund to another budgeted fund and use it for a purpose approved on the ballot. Previously, the trustees could transfer tax money after a public hearing but could only use tax money for a purpose allowed by the fund for which the taxes were levied. Trustees are prohibited from levying taxes to replace the money they transferred.
- Repeals a provision under 20-10-147 that previously required trustees to sell all of the district's buses and to obtain voter approval to close a bus depreciation

reserve fund. When closing a bus depreciation reserve fund, the balance may be transferred to any fund the trustees consider appropriate.

#### *State and County Impacts from Oil and Natural Gas Production*

- Establishes a state school oil and natural gas impact account. The funds will be distributed by the State Superintendent to applicant school districts that do not receive oil and natural gas production tax money but that are impacted by contiguous counties that benefit from oil and gas receipts. Applications will be awarded based on need and impacts, among other criteria.
- Establishes a county school oil and natural gas impact fund at affected counties. The funds will be distributed by the Department of Revenue to the affected counties for deposit into the fund. Counties may award money to school districts when a district receives 30% or less of the district's four-year average oil and natural gas production tax receipts; the average price of oil is \$50 or less for the fiscal year, or the production of oil in the county drops 50% or more below the county's five-year average production. Counties may retain 20% of the funds to pay outstanding capital project bonds or other expenses incurred prior to the reduction in price; to offset property taxes; to promote diversification and economic development in the county; to attract new industry; or to provide cash incentives for expanding the employment base in the impacted area.

#### *Pathway to Excellence Program*

- Establishes the Pathway to Excellence Program to promote educational excellence in Montana's public schools through data-driven decision-making and to maintain a focus on continuous improvement and increased academic achievement for public school students.
- Requires the Office of Public Instruction to develop on its website an educational data profile for each district, which contains:
  - school district contact information and links to district websites, when available;
  - state criterion-referenced testing results;
  - program and course offerings;
  - student enrollment and demographics by grade level; and
  - graduation rates.
- Requires each school district to annually report to the OPI and post on its website the following district information for the previous school year
  - the number and type of employee positions, including administrators;
  - the total amount of compensation paid to each school district employee by the district, including the employee's base wage or salary, overtime pay, and other income from school-sanctioned extracurricular activities,

- including coaching and similar activities; and
  - the certification held by and required of each employee;
  - the student-teacher ratio by grade;
  - the amount spent by the district for operation and maintenance, stated in total cost and cost per square foot;
  - the amount of principal and interest paid on bonds;
  - the total district expenditures per student;
  - the total budget for all funds;
  - the total number of students enrolled and the average daily attendance;
  - the total amount spent by the district on extracurricular activities and the total number of students that participated in extracurricular activities; and
  - the number of students that entered the 9th grade in the school district but did not graduate from a high school in that district and for which the school district did not receive a transfer request.
- Requires each school district to post on its website a copy of every working agreement the district has with any organized labor organization and the district's costs, if any, associated with employee union representation, collective bargaining, and union grievance procedures and litigation resulting from union employee grievances.
- Requires the Office of Public Instruction to implement a data collection plan to reduce redundant data requests, increase access to and use of data from centralized data systems, and promote transparency in reporting to schools, school districts, communities, and the public.
- Requires the OPI to gather, maintain, and distribute longitudinal, actionable data in the 10 essential data areas identified by the Data Quality Campaign.
  - statewide student identifier;
  - student-level enrollment data, including average daily attendance;
  - student-level statewide assessment data;
  - information on untested students;
  - student-level graduation and dropout data;
  - ability to match student-level K-12 and higher education data;
  - a statewide data audit system;
  - a system to track student achievement with a direct teacher-to-student match to help track, report, and create opportunities for improved individual student performance;
  - student-level course completion data, including transcripts, to assess career and college readiness; and
  - student-level ACT results, scholastic achievement test results, and advanced placement exam data.
  -



- By June 30, 2013, the OPI must begin presenting longitudinal data on academic achievement and develop plans for measuring growth based on the statewide student assessment.

#### *Multidistrict Cooperatives*

- Allows cooperative purchasing contracts between school districts to purchase supplies and services without complying with bid requirements if the group maintains an updated, publicly available master list of supplies and vendors. The group must allow vendors to compete twice yearly for inclusion on the master list.
- Authorizes two or more school districts to create a multi-district cooperative to perform any services, activities, and undertakings of the participating districts.
- Members of multi-district cooperatives may transfer moneys from any budgeted funds of the district to the prime agent (host) district of the cooperative for deposit into the interlocal agreement fund. Moneys must be used for the same purpose as the fund from which the transfer is made, and transfers must be made within the budget of the transferring fund(s). Districts may not tax to replace the funds transferred to a multi-district cooperative.
- SB 329 and HB 2 appropriated a total of \$2 million for the biennium for one-time payments to districts participating in multidistrict cooperatives as of December 31, 2012. Payments will be allocated to districts based on the proration of each district's FY 2013 BASE budget to the total of BASE budgets for all districts participating in multi-district cooperatives. Funding may be, but is not required to be, used to fund cooperative efforts.

#### *Montana Digital Academy*

- Changes the name of the Montana Virtual Academy to the Montana Digital Academy (MTDA).

# OFFICE OF PUBLIC INSTRUCTION

## STATE OF MONTANA

Denise Juneau  
Superintendent

[www.opi.mt.gov](http://www.opi.mt.gov)  
(406) 444-5643



April 25, 2011

The Honorable Arne Duncan  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, DC 20202

Dear Secretary Duncan:

Thank you for your leadership in promoting the new U.S. Department of Education's goals to ensure students are learning content based on high standards that are measured by quality assessments, that effective instructional practices are demonstrated in every classroom and visionary leadership is present in every school, that longitudinal data systems help states and districts to better inform educational policy and practice, and that all stakeholders work together to transform the lowest performing schools. While I do not agree with some components of your Department's implementation plan, I do support the overall goals that President Obama has established.

Montana's Office of Public Instruction has worked diligently to meet the new priorities outlined by your Department. My office has created a strong partnership with the school boards, educators, parents, communities, and students served by the federal School Improvement Grant. In addition, next month I will recommend the adoption of the Common Core State Standards to the Montana Board of Public Education. We are also a governing partner state in the SMARTER Balanced Assessment Consortium. Further, a state task force is currently making revisions to the Montana Accreditation Standards and, as a part of that revision process, is studying the implementation of an evaluation system of teachers and school leaders. Additionally, diligent work continues on our state longitudinal data system.

I was very encouraged by President Obama's support in his State of the Union speech for the reauthorization of the Elementary and Secondary Education Act (ESEA). I also applaud your recent meeting with several Montana educators, at the request of Sen. Jon Tester, to hear their views about the effects of federal education policy on rural schools. As you heard, congressional inaction on reauthorizing ESEA has led to many frustrations by Montana's educators. In the absence of a new bill, the Department continues to hold states and schools accountable under the current law although the ESEA accountability system does not conform to the Department's new priorities, particularly around growth models for student learning. This split in priorities, established under your leadership and those established in the current ESEA, has Montana reeling from additional data collection and uncertain about the path to continuous improvement. At the state

education agency level, it is difficult to travel down two divergent paths given our limited capacity and resources. At the district level, particularly in a frontier state like Montana, it is difficult to meet increasing data collection such as that required under the State Fiscal Stabilization Funds that implement new federal priorities in addition to continuing to meet ESEA requirements.

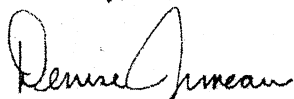
It's important to point out that Montana's education system believes in accountability. In fact, I am very proud of our state's educational outcomes. Our students generally perform very well on the National Assessment of Educational Progress and our state assessment, and we confront our challenges where there is need for reform. We all hope that ESEA reauthorization occurs very soon, particularly when your priorities point to a different accountability model that could be put into place. Additionally, as we shift to college and career readiness goals, implement new common core standards and assessments, move from highly qualified teachers to highly effective instruction, and transform our lowest performing schools, we need some alleviation of the strict across-the-board, one-size-fits-all, absolute bar of 100 percent proficiency on state assessments. You understand that the unrealistic 100 percent goal undermines the work and morale of students and educators and the public's confidence in schools.

In order to hold the line during the transition from one accountability system to another, it is important not to penalize our schools while we wait for overdue congressional action, and instead, provide a stable accountability measure for our schools. Therefore, I write to inform you that I am delaying the scheduled increase of the Annual Measurable Objectives (AMOs). Our current AMOs of 83 percent for reading and 68 percent for math certainly provide high learning targets for measuring Adequate Yearly Progress (AYP). Maintaining these AMOs provides a high bar for students to meet and promotes goodwill to our schools while we engage in meeting new federal priorities and educational reform.

Also, increasing the AMOs would result in the identification of an additional number of schools needing improvement, and my office does not have the capacity to reach all of the identified schools and provide the assistance required under the current ESEA. Our office resources are better used to continue our work with schools already identified for assistance than to increase the number of schools that cannot be offered the required additional resources needed simply because they are identified in need of improvement by the outdated ESEA requirements.

Thank you for your continued work on the federal government's educational priorities. I look forward to our continued partnership as we move toward a new and improved ESEA.

Sincerely,

A handwritten signature in cursive script, appearing to read "Denise Juneau".

Denise Juneau  
State Superintendent of Public Instruction



THE SECRETARY OF EDUCATION  
WASHINGTON, DC 20202

July 1, 2011

Honorable Denise Juneau  
Superintendent of Public Instruction  
State Office of Public Instruction  
P.O. Box 202501  
Helena, MT 59620-2501

Dear Superintendent Juneau:

I am writing in response to your letter and to follow up on your subsequent telephone conversation with senior U.S. Department of Education (Department) officials regarding the fact that Montana has delayed its scheduled increase of the State's annual measurable objectives (AMOs) for the 2010-2011 school year instead of increasing those AMOs consistent with the requirements of Title I of the Elementary and Secondary Education Act (ESEA), as amended by the No Child Left Behind Act (NCLB).

I appreciate Montana's interest in transitioning to college- and career-ready standards and the State's participation as a governing partner State in the SMARTER Balanced Assessment Consortium. I also am fully aware that many NCLB policies could pose potential barriers to State implementation of forward-looking reforms such as raising expectations for students by transitioning to college- and career-ready standards. Please understand, however, that there is no statutory authority for Montana to freeze its AMOs as you have indicated and maintain flat expectations for schools for the fourth year in a row.

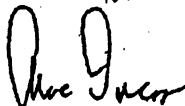
As you know, Montana has already taken advantage of available flexibility in the current law. Montana uses a "small school review" process, which permits it to use multiple criteria to determine adequate yearly progress (AYP) for small schools, of which Montana has many. More significantly, consistent with ESEA section 1111(b)(2)(H), Montana chose to increase its AMOs only once every three years. As a result, Montana's AMOs remained the same for school years 2007-2008, 2008-2009, and 2009-2010, resulting in flat expectations for schools for three years. By issuing AYP determinations in June 2011 that are based on the same annual targets used for the previous three years, Montana is now out of compliance with the federal law. Unfortunately, this action leaves the Department no alternative but to pursue enforcement action. Thus, we are placing a special condition on Montana's FY 2011 Title I, Part A grant award that will require Montana to comply with the statutory requirements and indicate that, if Montana does not comply, the Department will pursue further enforcement actions that may include the withholding of Montana's Title I, Part A funds. We urge you to reconsider your decision, and we welcome the opportunity to discuss this matter further.

As I indicated recently, the Obama Administration recognizes the challenges that States moving forward with reform are facing. We are developing a plan to consider regulatory flexibility in

return for reform that advances the academic achievement of students and the quality of their instruction in the event that reauthorization does not occur soon. However, I continue to believe that a reauthorized ESEA, which remains my top priority, is necessary for reforms to fully flourish and am hopeful that Congress will soon take action to strengthen and upgrade the nation's education law. I welcome any suggestions you may have for what a regulatory flexibility package might include should it be necessary to proceed in this manner.

Again, I appreciate your interest in implementing forward-looking reforms such as the transition to college- and career-ready standards. We look forward to working with you to put in place policies that more effectively meet the needs of Montana's children. However, until such policies are in place, Montana does need to comply with existing federal requirements.

Sincerely,



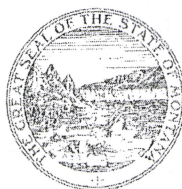
Arne Duncan



# OFFICE OF PUBLIC INSTRUCTION

## STATE OF MONTANA

Denise Juneau  
Superintendent



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(406) 444-5643

August 15, 2011

The Honorable Arne Duncan  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, DC 20202

Dear Secretary Duncan,

On April 25, 2011, I sent you a letter expressing my intention to maintain Montana's Annual Measurable Objectives (AMOs) at the 2010-11 levels of 83 percent in reading and 68 percent in mathematics. Seven weeks later, on the day we were sending our schools their preliminary AYP determinations under the frozen AMOs, Deputy Assistant Secretary Yudin called to inform me that Montana was out of compliance for delaying our scheduled increase of AMOs. I received written confirmation of that call from you on July 1. On July 7, the Department informed me that a special condition had been placed on our Fiscal Year 2011 ESEA Title I, Part A grant award that required a compliance report by August 15. Please consider this letter such a report. I had several follow-up calls with Deputy Assistant Secretary Yudin about this matter.

Your July 1, 2011, letter stated that Montana has held "flat expectations" for schools during the past three years. I respectfully disagree that AMOs under No Child Left Behind (NCLB) should be considered "expectations." As you know, each state has varying levels of AMOs, varying timelines for increasing AMOs, and varying levels of increases of AMOs. That is, until 2014, when 100 percent of students in America are to be proficient in reading and mathematics.

I know you understand this process, and its outcome, is flawed. If the game of basketball operated like NCLB, every student, despite her or his athletic ability or interest, must make the team; and then, the only way a student can score points is by a slam dunk. Under NCLB rules, free throws don't matter, lay-ups don't matter, three-point shots don't matter, assists don't matter, and rebounds don't matter. Only the slam dunk matters. And, over time, the basket keeps rising in height.

The fact is that Montana schools have steadily increased the percentage of students reaching proficiency or advanced on our state test. Since 2005-06, the percentage of students scoring proficient or advanced in reading has increased from 78 percent to 85 percent this year and, in math, from 61 percent to 68 percent. We should increase our expectations by measuring student growth and celebrate improvement when it occurs. Most Montana schools are doing

The Honorable Arne Duncan  
Page 2  
August 15, 2011

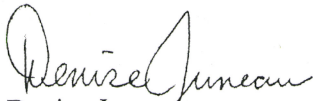
very well and can demonstrate their quality performance; however, they may miss one of the 41 categories they are required to "pass" under NCLB and are, therefore, publicly disgraced, although they may in fact be making progress. This happens most particularly because of the arbitrary and unfounded AMO process.

However, NCLB requires states to increase their AMOs every three years and holding our AMOs steady for the fourth year did place us out of compliance. Our offices were able to agree to a compromise that would place our AMOs at 84.4 percent in reading and 70 percent in mathematics for the 2010-11 school year. This means that we will amend our NCLB accountability workbook to change the trajectory in AMO increases, which will suffice for compliance with the law. A similar compromise - to amend the NCLB accountability workbook - was also established with Utah, Idaho, and South Dakota.

Under this compromise, 16 more schools and 2 additional districts will be placed on the "not making AYP" list. Again, this demonstrates that good schools that are providing a quality education in their communities are placed in the path of, what you pegged as, the "slow motion train wreck," otherwise known as NCLB's AMO and AYP process.

I appreciate the hard work of your Department staff to work with us to develop an amicable resolution to Montana's compliance issue.

Sincerely,

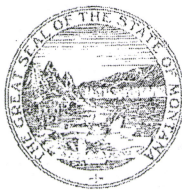


Denise Juneau  
State Superintendent of Public Instruction

Attachments

OFFICE OF PUBLIC INSTRUCTION  
STATE OF MONTANA

Denise Juneau  
Superintendent



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August 15, 2011

The Honorable Arne Duncan  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington DC 20202

Dear Secretary Duncan:

This letter submits a formal request to amend the Montana Accountability Workbook. The amendment concerns the Annual Measurable Objective (AMO) Trajectory used to determine Adequate Yearly Progress (AYP) for Montana schools and districts.

The Office of Public Instruction could have proposed a new trajectory in 2005-2006, but did not. The new targets are set using the same prior increments that we did, in fact, use for 2005-2006 through 2009-2010. The AMOs we originally used were higher than they had to be and we will hold Local Education Agencies (LEAs) accountable to those higher AMOs. We will not recalculate AYP for those years. A chart showing the proposed AMOs is enclosed with the letter.

Thank you for your assistance. If you have questions or require further information, please contact Assistant Superintendent Nancy Coopersmith at (406) 444-5541 or by e-mail to [ncoopersmith@mt.gov](mailto:ncoopersmith@mt.gov). I look forward to continuing our work together to develop an accountability system that takes into account the needs of rural states.

Sincerely,

A handwritten signature in cursive script that reads "Denise Juneau".

Denise Juneau

State Superintendent of Public Instruction

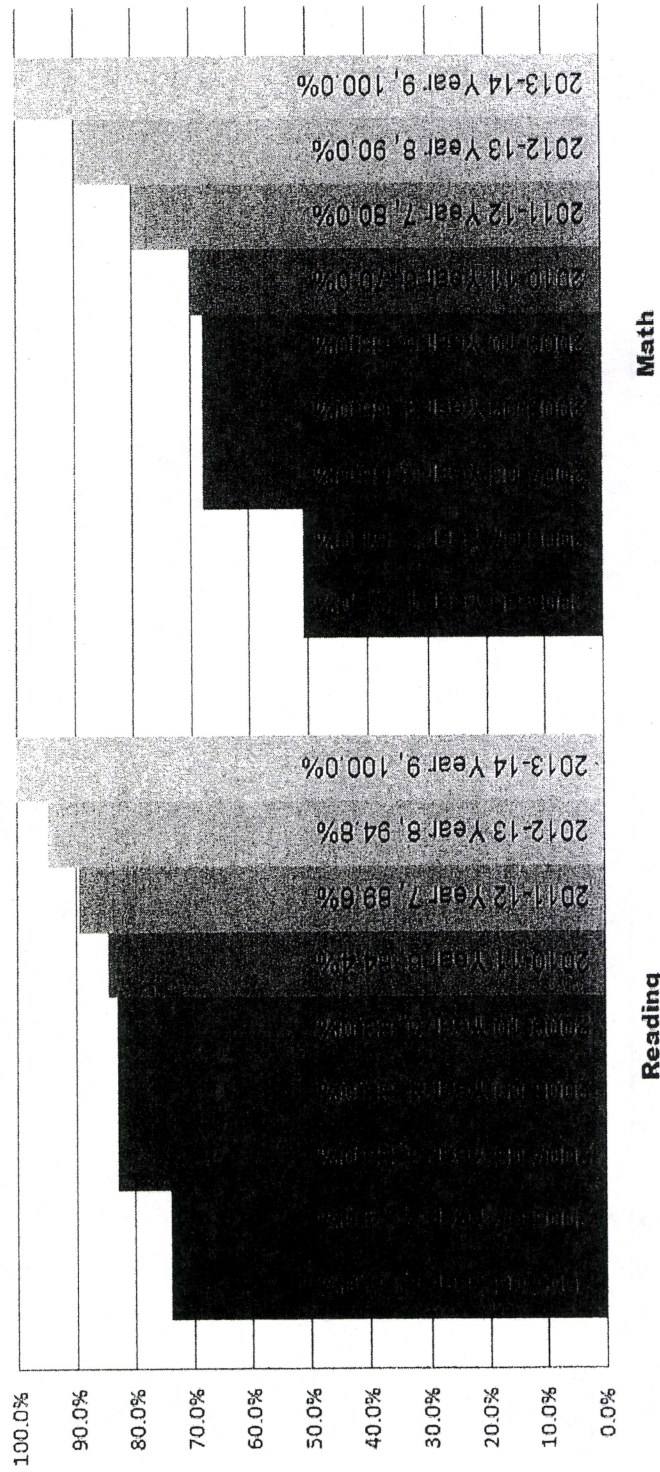
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Collette Roney

Enclosures





# Montana Annual Measurable Objective Trajectory Amended as of August 12, 2011



Montana  
Office of Public Instruction  
Denise Juneau, State Superintendent

opi.mt.gov



Montana  
**Office of Public Instruction**  
Denise Juneau, State Superintendent

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August 2011

Greetings! We hope your district's preparations are going well for the start of the 2011-12 school year.

We want to let you know about recent developments at the Office of Public Instruction (OPI) for the design and revision of K-12 education data systems. These developments will have a significant, and hopefully beneficial, impact on the way that OPI and schools share and provide access to K-12 education data.

As OPI moves forward with these efforts, we are committed to an open process involving school districts and policymakers. We understand it is critical to provide adequate notice to school districts of upcoming data collections. For the new reporting requirements established by the state legislature in Senate Bill 329 (SB 329), the OPI will release data definitions, file formats, policies and timelines early in the 2011-12 school year. Most of the actual collection of the SB329 new data elements will begin in 2012-13. This timeframe will give school districts an opportunity to plan for the implementation, and it should improve the quality of the data collected.

We know that new system requirements will place increased demands on school district staff time and resources. In order to mitigate these costs, wherever possible, OPI will work with vendors who provide accounting, human resource management, and school management software to Montana school districts. OPI will work with these vendors to design file extracts from their software systems. We also plan to provide training in both electronic formats and in-person training sessions in order to make the most efficient use of school staff time and availability.

As with many new information systems and processes, the new data collected from schools will not be perfect the first year. For those OPI data collection tools that are used for critical state level activities (distribution of funding, accreditation of schools), OPI may find it necessary to run parallel systems (old and new) for at least one full cycle.

## SENATE BILL 329

Senate Bill 329, adopted by the 2011 Legislature, contains many new requirements for data collection and reporting by OPI and school districts. The major additions include the creation and posting of a district education profile for each school district and the posting of salary and benefit information for all school employees (both licensed and classified staff), average daily attendance of enrolled students, and the numbers of students participating in extracurricular activities.

### District Education Profiles

SB 329 requires OPI to post, on its website, an educational data profile for each district, which contains:

- school district contact information and links to district websites, when available;
- state criterion-referenced testing results;
- program and course offerings;
- student enrollment and demographics by grade level; and
- graduation rates.

Meeting this requirement will require no new data collection from school districts.

*The Montana Office of Public Instruction provides vision, advocacy, support, and leadership for schools and communities to ensure that all students meet today's challenges and tomorrow's opportunities.*



### **Annual Reports to OPI**

SB 329 also requires each school district to annually report to OPI and post on its website the following district information for the previous school year:

- the number and type of employee positions, including administrators;
- the total amount of compensation paid to each school district employee by the district, including the employee's base wage or salary, overtime pay, and other income from school-sanctioned extracurricular activities, including coaching and similar activities; and
- the certification held by and required of each employee;
- the student-teacher ratio by grade;
- the amount spent by the district for operation and maintenance, stated in total cost and cost per square foot;
- the amount of principal and interest paid on bonds;
- the total district expenditures per student;
- the total budget for all funds;
- the total number of students enrolled and the average daily attendance;
- the total amount spent by the district on extracurricular activities and the total number of students that participated in extracurricular activities; and
- the number of students that entered the 9th grade in the school district but did not graduate from a high school in that district and for which the school district did not receive a transfer request.

OPI will create these postings for school districts with data we collect from them. School districts already report many of these data elements to OPI. However, there are some new collections that will be required under SB 329. These new requirements are described below.

### **Average Daily Attendance**

OPI currently computes average daily attendance based on two official count dates, the first Monday in October and February 1. It became clear during the legislative session that many legislators expect OPI to collect attendance data that reflects student attendance over the course of the entire school year. SB 329 requires school districts to report to OPI the total number of students enrolled in the district and their average daily attendance. For 2011-12, OPI plans to collect from each school district the days of attendance and days of enrollment for each student. The determination of present and absent will be based on each individual school district's policy. This collection will be a year-end collection through AIM State Edition. The 2011-12 school year will provide districts and OPI with an opportunity to evaluate the data collection process and the quality of the data. Once the 2011-12 "trial year" is completed, OPI will propose rules which define average daily attendance for the long-term.

### **Salaries and Benefits**

Another component of SB 329 requires schools to report the total amount of compensation paid to each school district employee, including the employee's base wage or salary, overtime pay, and other income from school-sanctioned extracurricular activities, including coaching and similar activities. To meet this requirement, OPI will collect salary and benefit data for each school district employee through MAEFAIRS based on the School Accounting Manual, Chart of Accounts. OPI provided a preliminary list of fund, program, function and object codes to school districts at the Montana Association of School Business Officials (MASBO) conference in June 2011. We are now refining our plans for this data collection based on feedback we received from school business officials.

The file format for this collection will be released in early October 2011. We are seeking volunteers to participate in a pilot project for 2011-12 with full implementation of the collection in 2012-13. We are already working with vendors of school district accounting and human resource systems, including CSA and Black Mountain, to develop file exports in an effort to ease the burden on school districts for this collection.

Along with the collection of salary and benefit data for each school employee, the OPI is developing a system to assign a statewide identifier for each school district employee. The OPI will use a tool, which is within its new educator licensure system, to assign these identifiers to school staff. The new licensure system has an anticipated completion date of March 2012. To request these identifiers, school districts will submit requests (electronically) for staff identifiers to the OPI along with a basic set of elements associated with each employee. This process will be similar to the process used by school districts to request statewide student identifiers.

#### **Extracurricular Activities**

SB 329 requires each school district to report the total amount spent on extracurricular activities and the total number of students that participated in extracurricular activities. OPI has not yet developed plans or objectives for meeting this requirement. We will be pulling together an advisory group to develop options for gathering this information from districts.

### **ON-GOING SYSTEM DEVELOPMENTS**

#### **State Longitudinal Data System (GEMS)**

In March 2009, the OPI was awarded a 4-year, \$5.7 million grant by the U.S. Department of Education to improve the state's management of K-12 education data and to build a statewide longitudinal data system that makes data accessible to policymakers, educators and the public. During the 2010-11 school year, OPI worked with ESP Solutions to map out the data we collect, where it is stored, and how it is managed within the agency's information systems. Upon completion of the data mapping project, the OPI contracted with a vendor team which includes Vexcel, Microsoft, and Aspect, Inc. to develop a K-12 education data warehouse and to design the tools to access and display the data. We have named the state longitudinal data system project GEMS, Growth and Enhancement of Montana Students.

With the planning and design phases nearing completion, the OPI will soon begin loading data into its new K-12 data warehouse. The warehouse will allow OPI staff, school district personnel, and the public to access a wide variety of data related to K-12 education and to analyze trends across time. OPI plans to load student-related data into the data warehouse first, including enrollment, demographic, program participation, and assessment data. In the next phase, OPI will load data related to educators, including licensure information, teaching assignments and qualifications. This process of loading data into the warehouse is expected to be completed within 18 months.

#### **Educator Licensure**

The OPI has contracted with Hupp Information Technologies to rewrite its educator licensure system and expects to bring the new system into production in March 2012. This new system will replace an outdated legacy system that has been modified through the years to support the evolving needs of OPI, the Board of Public Education, educator preparation programs, and educators.

Key features of the new educator licensure system include:

- Improved capacity to process applications for educator licensure and to monitor educators' credentials
- Greater electronic access by school district personnel to the educator licensure system, including a feature for school administrators to inform licensure staff when schools are trying to hire someone with a pending licensure application
- Better integration of educator licensure data with the other OPI data
- More responsive maintenance and support to allow Montana to respond to new licensure requirements
- Ability for Montana educators and licensure applicants to check the status of their applications and credentials online

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- Access for licensure officials at Montana's educator preparation programs to recommend approved program completers for their initial license, add endorsements, and report internships
- Automation of workflow and many tasks that are currently completed manually
- Significant reduction in staff time spent entering data that currently arrives at OPI in paper format

#### **National Student Clearinghouse**

With state funding for the 2013 biennium, OPI will continue its contract with the National Student Clearinghouse to track college continuation rates and persistence rates for Montana high school graduates. The state's contract provides every Montana high school access to the *StudentTracker* tool, which the school can use to obtain information about the postsecondary enrollments of its high school graduates.

As you can see, these are significant projects for both school district and OPI staff. We are developing plans to engage school personnel (including school leadership, technology directors, and those responsible for entering data into the OPI data collection tools) in our design and implementation phases. We know the importance of involving our stakeholders at every stage of the process. We need your input, suggestions, feed-back and support in order for these efforts to succeed.

OPI will continue to share information with school districts about these projects through the OPI website, official e-mail to districts, and the monthly Summary of OPI Activities. As you have questions about these projects, please feel free to contact any of the following OPI staff.

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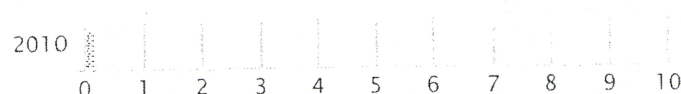
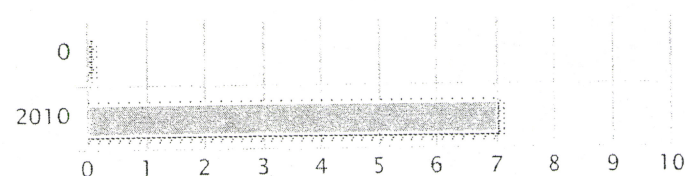
Email: info@dataqualitycampaign.org

**Using Data to Improve Student Achievement**

Data Quality Campaign - Using Data to Improve Student Achievement

**Montana: 2010 DQC State Analysis**
**Progress on building and using data systems**

The 10 Essential Elements and 10 State Actions provide a roadmap for state policymakers to create a culture of effective data use in which quality data are not only collected but also used to increase student achievement. The greatest strides have been made in the collection of data, but states must now turn their focus to the effective use of the quality data.

**NUMBER OF ACTIONS MET**

**NUMBER OF ELEMENTS MET**

**Actions Met**

- ☒ 1: Link data systems
- ☒ 2: Create stable, sustained support
- ☒ 3: Develop governance structures
- ☒ 4: Build state data repositories
- ☒ 5: Implement systems to provide timely access to information
- ☒ 6: Create progress reports using individual student data to improve student performance
- ☒ 7: Create reports using longitudinal statistics to guide systemwide improvement efforts
- ☒ 8: Develop a P-20/workforce research agenda
- ☒ 9: Promote educator professional development and credentialing
- ☒ 10: Promote strategies to raise awareness of available data

**Elements Met**

- ☒ 1: Statewide Student Identifier
- ☒ 2: Student-Level Enrollment Data
- ☒ 3: Student-Level Test Data
- ☒ 4: Information on Untested Students
- ☒ 5: Statewide Teacher Identifier with a Teacher-Student Match
- ☒ 6: Student-Level Course Completion (Transcript) Data
- ☒ 7: Student-Level SAT, ACT, and Advanced Placement Exam Data
- ☒ 8: Student-Level Graduation and Dropout Data
- ☒ 9: Ability to Match Student-Level P-12 and Higher Education Data
- ☒ 10: A State Data Audit System

### Ability to answer critical policy questions

As state policymakers strive to ensure every student is taught by an effective teacher and ready for college and highly skilled careers, they must also make drastic budget cuts.

States cannot do more with less without collecting and using quality data to determine which programs and policies increase student achievement and the state's return on investment. With the 10 Essential Elements in place, policymakers and practitioners can begin to answer today's critical policy questions, including:

Critical Policy Question	MT Implementing	Implications
What percentage of students graduate, according to the four-year cohort graduation rate required by the 2008 federal regulations? Elements 1, 2, 8	YES	States can answer many of the critical questions confronting state policymakers. However, state policymakers have not created a culture of effective data use that ensures data are linked and accessible and that stakeholders have the capacity to use data.
What percentage of students require remediation in postsecondary institutions? Elements 1, 2, 8, 9	YES	
Which teachers consistently achieve the most individual student growth in their classrooms? Elements 1, 2, 3, 4, 5	NO	
Which professional development programs have the greatest impact on the effectiveness of teachers as measured by student performance? Elements 1, 2, 3, 4, 5, 6, 7	NO	

### National Comparison

The DQC's sixth annual state analysis, *Data for Action 2010*, reveals that states have made unprecedented progress collecting longitudinal information that follows individual students over time. However, states have not taken the necessary actions to create a culture of effective data use.

States must also act to ensure that data can be linked across education systems, data are accessible to stakeholders and those stakeholders have the capacity to use data to improve student achievement.

To leverage current investments in state data systems and ensure data are used, states must now focus on the following key priorities:

- Fulfill the 50-state commitment to implement the 10 Essential Elements by September 2011.
- Link K–12 with early childhood, postsecondary, and workforce data to answer critical policy questions.
- Provide teachers, students and parents with access to longitudinal student-level data.
- Share data about teacher impact on student achievement with educator preparation institutions.
- Enact statewide preservice policies, including certification and licensure, and program approval, to build educator capacity to use data



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## Data Quality Campaign: 10 State Actions to Support Effective Data Use OPI Assessment of Montana's Ability to Implement

- 1. Link state K-12 data systems with early learning, postsecondary education, workforce, social services and other critical agencies**
  - Out of scope for GEMS
  - First implementation will be with DPHHS if we get the Direct Certification grant
- 2. Create stable, sustained support for robust state longitudinal data systems**
  - Out of scope for GEMS
  - From the DQC
    - Ensure state budgetary investment for the maintenance and growth of statewide P-20/W longitudinal data systems
    - Create the political demand for data sharing – share the advantages of having information follow individual students, even across state and district lines, and to break down traditional silos.
- 3. Develop governance structures to guide data collection, sharing and use**
  - ✓ GEMS will accomplish
- 4. Build state data repositories (e.g., data warehouses) that integrate student, staff, financial and facility data**
  - ✓ GEMS will accomplish
- 5. Implement systems to provide all stakeholders with timely access to the information they need while protecting student privacy**
  - ✓ GEMS will accomplish
- 6. Create progress reports with individual student data that provide information educators, parents and students can use to improve student performance**
  - ❖ GEMS will lay the groundwork, but will not complete this goal
  - ❖ From the DQC
    - Ensure that on-line access to these reports are available to appropriate users while protecting student and teacher privacy by limiting access to appropriate users.
    - Support the development of early warning systems, growth models and predictive analysis tools that use longitudinal student data to inform and improve teaching and learning.
- 7. Create reports that include longitudinal statistics on school systems and groups of students to guide school-, district-, and state-level improvement efforts**
  - ✓ GEMS will accomplish

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**8. Develop a purposeful research agenda and collaborate with universities, researchers and intermediary groups to explore the data for useful information**

- ❖ GEMS will make this possible, but it is not currently in scope
- ❖ From the DQC
  - Encourage the development of strategic partnerships with universities, researchers, and intermediary groups to help establish a robust research agenda.
  - Ensure that researchers have appropriate access to longitudinal data.

**9. Implement policies and promote practices, including professional development and credentialing, to ensure educators know how to access, analyze and use data appropriately**

- Out of scope for GEMS
- From the DQC
  - Require educators seeking certification and certification upgrades to show competence in data analysis, interpretation and use.
  - Promote and support educator professional development with regard to data access, use and analysis.
  - Ensure that educator and leadership preparation programs have appropriate data to conduct analysis for programmatic improvement.
  - Support the development of a culture of data at the district level by emphasizing the role of robust data systems in the school improvement planning process and professional development activities.
  - Support district efforts to provide educators access to the appropriate technology to enable data access, analysis, and communication at the building level.

**10. Promote strategies to raise awareness of available data and ensure that all key stakeholders, including state policymakers, know how to access, analyze and use the information**

- ✓ GEMS will accomplish
- ✓ From the DQC
  - Promote training on data use for parents, students, school board members, state executive and legislative staff, SEA personnel, education writers and journalists, community leaders, and the general public.
  - Ensure that stakeholder training is provided in multiple formats.